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DDA QUARTERLY - 2nd Qtr FY 85

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15 Feb 85	Note of new D/L's objective for future qtrlies	1
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15 Feb 85

Evelyn,

A few notes from Tony's staff meeting that you might be interested in:

1. Two of OL's 22 initiatives have been approved.

[REDACTED]

3. [REDACTED] wife was killed in a car crash [REDACTED]

4. [REDACTED] is making a report on the [REDACTED] Committee (this apparently has a connection with [REDACTED] comments about ODP and the committee in the DA planning meeting we attended several weeks ago).

5. Hank wants people to know that LIMS is very much alive. There are no plans to walk away from it...he intends to make it work and bring it online.

6. Hank said the DDA quarterly went fairly well. He asked [REDACTED] to take a closer look at the organization and design of future quarterlies. Hank's objective is to sell OL to the DDA. He wants the DDA to see us in our most favorable light. The quarterly should not be just our objectives. The design needs to be a little different as to kinds of presentations and what goes into them. He feels that people who do the work need the identity and he wants them to make the presentations--whether on a objective or a subject that is brought up to sell OL. He wants to show our people and their products. He asked stf/div chiefs to get directly involved with their people and, where the speakers can't speak well, to develop them.

7. Hank received our subjects for the OL Planning Conf and will be going over them w/Walt and John early next week. Hank thinks we'll go with fewer subjects but do them well.

8. The first Configuration Management meeting will be held with the ExDir on 3/4. [REDACTED] mentioned this in the DDA quarterly on 2/13.)

9. Tony encourages all IMSS'ers to attend the presentation on employee benefits, to be held in 2C19 on 2/20.

[REDACTED]

~~CONFIDENTIAL~~

10 APR 1985

MEMORANDUM FOR: Chief, New Building Project Office, OL
Chief, Budget and Fiscal Branch, OL
Chief, Personnel and Training Staff, OL
Chief, Procurement Management Staff, OL
Chief, Security Staff, OL
Chief, Headquarters Operation, Maintenance
and Engineering Division, OL
Chief, Printing and Photography Division, OL
Chief, Procurement Division, OL
Chief, Real Estate & Construction Division, OL
Chief, Supply Division, OL

FROM: Henry P. Mahoney
Director of Logistics

SUBJECT: FY 85 Second Quarterly Planning Conference

1. The Office of Logistics' (OL) FY 85 Second Quarterly Planning Conference with the DDA is scheduled for 0930 hours, 20 May 1985, [redacted] A Dry Run is scheduled for 1430 hours, 13 May 1985, [redacted] Building.

2. We will be expanding the scope of the May conference (and future Quarterlies) so as to present an enhanced, broader image of OL; create a more formal briefing atmosphere; and expose our people and products. Your support is essential to our achievement of this goal. In particular, I ask you to become directly involved, first, in coordinating with the Information and Management Support Staff (IMSS) to prepare topics that fulfill the above intentions and, second, in developing the briefing skills of employees who will be making presentations.

3. You will note, in the attached agenda, that the May Quarterly will begin with a summary of OL activities and accomplishments for the Second Quarter and be followed by other topics of major interest. It is my understanding that these topics have been coordinated with you if the subject involves your division or staff.

OL 4062-85

ADMINISTRATIVE - INTERNAL USE ONLY

ADMINISTRATIVE - INTERNAL USE ONLY

SUBJECT: FY 85 Second Quarterly Planning Conference

a. For preparation of the Summary of Activities and Accomplishments for Second Quarter, please submit to IMSS no later than 18 Apr a report listing the title of each activity or accomplishment, a brief but descriptive narrative (with statistics wherever possible) describing it, and a draft of a recommended graphic for illustration purposes. I would emphasize that these subjects need not be "significant" or "special" activities or accomplishments but rather your daily activities and "bread-and-butter" functions.

b. In addition, the Summary of Activities and Accomplishments will include a brief report to the DDA on the status of Directorate-level objectives (a list of those objectives is attached). To meet this requirement, please provide to IMSS by 18 April a notation as to those Directorate-level objectives that have been completed, those that are on schedule, and those that are not on schedule, with a description of problems and proposed resolutions for the latter.

c. Persons designated to present topics of interest should plan to include in their presentations a complete summary of the activity, resources required, means by which accomplished, and problems and means by which they were resolved (or plans for resolution). Presenters are responsible for developing graphics to enhance their presentations. Presentations should not exceed five (5) minutes.

d. I suggest that you have your presenters coordinate both the text of the presentations and proposed graphics with IMSS well in advance of the Dry Run. [redacted] and [redacted] will be meeting with you and the presenters during the upcoming weeks to offer their assistance. Meanwhile, please contact them if you have questions or need clarification on the information I have provided.

4. Separate from the DDA Quarterly, IMSS will make a quarterly report to me on those Office-level objectives that are not on schedule. That report will replace the discussion of Office-level objectives formerly held during one Bi-Weekly in each quarter. So that I can receive the first of these reports in early May, information on Office-level objectives (list also attached) must be provided to IMSS by 25 April and must include

SUBJECT: FY 85 Second Quarterly Planning Conference

a listing of those completed, on schedule, and not on schedule
(with an explanation of problems and proposed resolutions for
the latter).

Henry P. Mahoney ✓

Attachment:
Proposed Agenda

SUBJECT: FY 85 Second Quarterly Planning Conference

Distribution:

- 1 ea. Addressee w/att
- 1 - D/L Chrono w/att
- 1 - OL Files w/att
- ① - OL/IMSS Official w/att
- 1 - OL/IMSS Chrono w/att

ORIG: OL/IMSS/[] ;mjs

10 April 1985

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AGENDA

OFFICE OF LOGISTICS

FY 85 SECOND QUARTERLY PLANNING CONFERENCE

20 May 1985 - 0930 Hours

Opening Remarks

Henry P. Mahoney, D/L

Summary of OL Activities/Accomplishments
for Second Quarter

C/IMSS/OL

Support of WANG/CRAFT Installations

OL/RECD

T.V. Survey in the DA by P&PD

OL/P&PD

Engineering Support

OL/RECD

Changes in Procurement Practices:
Competition in Contracting Act

OL/PD

Alternate: Projects

OL/RECD/FEB

Closing Remarks

Henry P. Mahoney, D/L

Note: Final topics will be determined at the Dry Run.

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Official

ROUTING AND RECORD SHEET				
SUBJECT: (Optional) FY 85 Second Quarterly Planning Conference				
FROM: Henry P. Mahoney Director of Logistics		EXTENSION	NO. Attachment to OL 4062-85	
			DATE 10 April 1985	
TO: (Officer designation, room number, and building)	DATE		OFFICER'S INITIALS	COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)
	RECEIVED	FORWARDED		
1. C/NBPO/OL 73E40 HQS				Attached are listings of Directorate and Office level objectives that were inadvertently omitted from the 10 April memo, same subject as above. <div></div>
2. C/B&FB/OL <div></div>				
3. C/P&TS/OL <div></div>				
4. C/PMS/OL <div></div>				
5. C/SS/OL <div></div>				
6. C/HOME/OL 3E14 HQS				
7. C/P&PD/OL <div></div>				
8. C/PD/OL <div></div>				
9. C/RECD/OL <div></div>				
10. C/SD/OL <div></div>				
11.				
12.				
13.				
14.				
15.				

FY 85 DIRECTORATE LEVEL OBJECTIVES

New Building Project Office (NBPO)

- New Building Construction (Office level)*
- Develop Professionalism Program Within Office of Logistics for both Blue and White Collar Workers* (Office level)
- Develop a Transportation Plan for the Operation of the Consolidated Headquarters (Office level)
- Establish a Standard Selection of Modular Office Furniture to Replace Gray Metal Furniture and Meet Word/Data Processing Needs (Office level)

Information and Management Support Staff (IMSS)

- Establish Overseas Personal Computer Capabilities* (Office level)
- Develop and Implement the Logistics Integrated Management System (LIMS)* (Office level)
- Conduct a Study of OL's Service Environment and Develop an Orientation Program to Enhance OL's Service Image

Personnel and Training Staff (P&TS)

- Initiate a Recruitment Program to Ensure That OL is at Ceiling in All Critical Areas on 30 September 1985. (Office level)
- Develop a Student Intern Program as a Recruitment Tool (Office level)

Procurement Management Staff (PMS)

- Convert General Provisions Used in Agency Contracts from DAR to FAR* (Office level)

Security staff (SS)

Headquarters Operations, Maintenance, and Engineering Division (HOME)

- Establish a Configuration Management System (Office level)

*Carried over from FY 1984
+Cancelled
#Completed

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FY 85 DIRECTORATE LEVEL OBJECTIVES

- Procure and Install an Automatic Courier Receipt Filing, Tracing, and Retrieval System as well as the Codeword Accountability System for the H&CS* (Office level)
- Implement the DDA's Quality of Life Program at Headquarters Building* #(Office level)
- Implement the Agency Takeover of M&O of Headquarters Facilities from GSA* (Office level)#
- Establish a Centralized OL Support Center (Office level)

Printing and Photography Division (P&PD)

- Complete Implementation of P&PD Prepress System Basic Operating Capability (2-year project)* (Office level)
- Explore Available and Emerging Methods for Improved Document Control (Office level)
- Conduct a Base Line Survey of all P&PD Requirements and Establish Benchmarks For Current Capability. The results of the survey will be used to gauge anticipated impact of the opening of the New Headquarters Building and to categorize work as a potential for contracting out (Office level)
- Provide Electronic Interfacing for Computer Graphics Enhancements Between VM and P&PD Graphic Design Recorders. (Office level)

Procurement Division (PD)

- Improve Vendor Delivery (Office level)
- Enhance Current Efforts to Reduce Contract Settlement Backlog --joint MBO with OF (Office level)

*Carried over from FY 1984
+Cancelled
#Completed

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FY 85 DIRECTORATE LEVEL OBJECTIVES

Real Estate and Construction Division (RECD)

- Continue with Design and Major Construction for General Upgrading and Expansion (Office level)

Supply Division (SD)

- Examine Agency Type II Property Accounting System--joint with OF and IG (Office level)
- Consolidate Agency Repair and Return (Office level)

*Carried over from FY 1984
+Cancelled
#Completed

FY 85 OFFICE LEVEL OBJECTIVES

Information and Management Support Staff (IMSS)

- Study Feasibility of Providing Interim LIMS Capability Overseas in Advance of MERCURY+

Personnel and Training Staff (P&TS)

- Reorganization of P&TS (based on plan presented to DD/L on 28 September 1984)
- Upgrade of OL Personnel Soft Files
- Upgrade Wang Training and Utilization

Procurement Management Staff (PMS)

- Study of Agency Procurement System by Outside Contractor

Security Staff (SS)

- Update of Standard Security Procedures for Contractors Security Manual
- Upgrade Wang Training and Utilization

Headquarters Operations, Maintenance, and Engineering Division (HOME)

- Renovate and Refurnish Courier Lounge Within the Mail and Courier Section
- Upgrade Exhibit Corridor (1D HQ) with Safer, Sturdier Equipment
- Hire Cooperative Students for Training in the EDR
- Implement Corrective Action to Customer Surveys in HOME*#
- Institute a Program to Have Personnel in Agency Buildings Take More Pride in their Working Areas and Buildings
- Resolve the Problem of the DCI Portraits*
- Study on Improved Classified Waste Disposal System

*Carried over from FY 1984
+Cancelled
#Completed

FY 85 OFFICE LEVEL OBJECTIVES

- Examine, Determine, and Assign Relative Responsibility for M&O of External Facilities--joint MBO with RECD#
- Upgrade Wang Training and Utilization

Printing and Photography Division (P&PD)

- Develop and Implement an Automated Maintenance System for P&PD
- Evaluate Feasibility of an Automated Waste Paper Disposal System
- Explore Optical Digital Data Disk (OD³) Requirements and Capabilities
- Evaluate the Feasibility of Expanding P&PD Video Support to the Intelligence Community by Making Foreign Standards Conversion Service Available
- Continuation of Quality Circles Program*

Procurement Division (PD)

- Develop and Provide Guidance Relative to the Standardization of Specifically Identified Items in the Agency
- Upgrade Wang and Delta Data Training and Utilization

Real Estate and Construction Division (RECD)

- Develop 160,000 Square Feet of Temporary Space
- In Conjunction with NBPO and HOME, Ascertain which Leased Buildings will be Retained/Relinquished and Proposed Agency Occupants Thereof Once New Headquarters Building is Complete
- Conduct the Necessary Planning and Contract for the Acquisition, Design, and Direct Construction Modification to External Buildings to be Retained
- Continue with Staffing of DDO Requirements/Implementation Facilities Group

*Carried over from FY 1984
+Cancelled
#Completed

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FY 85 OFFICE LEVEL OBJECTIVES

- Obtain A&E Contractors to Supplement Agency Engineering Resources in Order to Facilitate Design and Construction

- Automate and Modernize RECD with Wang Equipment and Systems Furniture
- Examine, Determine and Assign Relative Responsibility for M&O of External Facilities--joint with HOME.
- Upgrade Wang Training and Utilization

Supply Division (SD)

- Update GSA-Leased Vehicle Inventory and Establish Vehicle Records in the FARS Minicomputer System for Financial Tracking in Conjunction with OF*#
- Expand Communications Tech Facility [] to Double Size of Environmentally Controlled Area
- Enhance Automation [] to Include LIMS Interface
- Provide Management Information on the Upgrade []
- Implement Bar Coding []

- In Coordination with P&PD, Prepare a Briefing Film on Supply Division Organization/Activity at Headquarters and in the Field*+
- Establish In-house Wang Program for Control of Shipping Indicators
- Establish a Data Base in Wang VM to Utilize as a Master Station list in P&PS/CD Detailing, All Pertinent Shipping, Marking, and Packing Specifications#
- To Initiate a Multi-year Plan to Improve and Upgrade the Physical Plant and Working and Operating Conditions [] Beginning in FY 85.
- Upgrade Wang Training and Utilization

*Carried over from FY 1984
+Cancelled
#Completed

19 APR 1985

MEMORANDUM FOR: Chief, Information and Management Support
Staff, OL

FROM:

Chief, Headquarters Operations, Maintenance
and Engineering Division, OL

SUBJECT: FY 1985 Second Quarterly Planning Conference

REFERENCE: Mtpl Adse Memo from D/L, dtd 10 Apr 85,
Same Subject

1. In response to referent memorandum, summaries of activities and accomplishments are submitted for each OL/HOME staff and branch as Attachment A. The Directorate-level objective reports and milestone charts for the branches mentioned on the list attached to the referent memorandum are submitted as Attachment B.

2. This report is forwarded without editing and as submitted by each HOME Branch or responsible action officer. To facilitate the compiling of a more uniform Division report, it is requested that future requests for this data provide sufficient lead time to allow consolidation of these submissions into a single report.

Attachments
As stated

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THE COMPETITION IN CONTRACTING ACT OF 1984
(TITLE VII OF THE SPENDING REDUCTION ACT, DEFICIT REDUCTION ACT OF 1984)

I AMENDS

1. ARMED SERVICES PROCUREMENT ACT (ASPA)
2. FEDERAL PROPERTY AND ADMINISTRATIVE SERVICES ACT (FPASA)
3. OFFICE OF FEDERAL PROCUREMENT POLICY ACT (OFPPA)
4. BUDGET AND ACCOUNTING ACT (BAA)

II IMPLEMENTATION

1. THE PROVISIONS OF THIS ACT APPLY TO ANY SOLICITATION FOR BIDS OR PROPOSALS ISSUED AFTER MARCH 31, 1985
2. FAR IMPLEMENTATION MUST BE COMPLETED BY MARCH 31, 1985
3. BID PROTEST PROCEDURES EFFECTIVE JANUARY 15, 1985

AMENDMENTS TO THE OFFICE OF FEDERAL PROCUREMENT POLICY (OFPP) ACT

I COMMERCE BUSINESS DAILY (CBD) NOTICE REQUIREMENTS ARE FOUND IN THE OFPP ACT AMENDMENTS AND IN PUBLIC LAW 98-72 (AMENDMENT TO SMALL BUSINESS ACT)

1. BOTH STATUTES REQUIRE THAT NOTICE OF SOLICITATION BE PUBLISHED FOR PROCUREMENT ACTIONS OF \$10,000 AND OVER. NOTICE OF AWARD ALSO MUST BE PUBLISHED FOR PROCUREMENT ACTIONS OF \$25,000 AND OVER IF SUBCONTRACTING OPPORTUNITIES ARE LIKELY TO OCCUR. (P.L. 98-72 EXEMPTS "CLASSIFIED" PROCUREMENTS FROM SUB-CONTRACTING OPPORTUNITY NOTICE REQUIREMENTS)
2. BOTH ACTS REQUIRE 15 DAYS BETWEEN NOTICE AND ISSUANCE OF THE SOLICITATION. (P.L. 98-72 ALSO REQUIRES 30 DAYS BETWEEN NOTICE AND ISSUANCE OF AN R&D SOLICITATION)
3. THE OFPP ACT AND P.L. 98-72 BOTH REQUIRE SIMILAR INFORMATION IN THE NOTICE OF SOLICITATION, BUT DIFFER AS TO INFORMATION TO BE INCLUDED FOR "OTHER THAN COMPETITIVE" PROCEDURES AND "SOLE-SOURCE" CONTRACTS.

II ADVOCATE FOR COMPETITION; REPORT TO CONGRESS

1. THE AMENDMENTS ESTABLISH AN ADVOCATE FOR COMPETITION IN EACH EXECUTIVE AGENCY AND IN EACH PROCURING ACTIVITY WITHIN THE AGENCY. THE ADVOCATE FOR COMPETITION IS RESPONSIBLE FOR CHALLENGING BARRIERS TO AND PROMOTING FULL AND OPEN COMPETITION IN THE AGENCY'S PROCUREMENT.
2. EACH AGENCY MUST MAKE AN ANNUAL REPORT TO CONGRESS SPECIFYING THE AGENCY'S PLANS TO INCREASE COMPETITION AND TO REDUCE NON-COMPETITIVE CONTRACTS AND SUMMARIZING THE ADVOCATE FOR COMPETITION'S ACCOMPLISHMENTS DURING THE PREVIOUS FISCAL YEAR. THIS REPORT WILL BE MADE EACH YEAR, FOR FIVE YEARS, STARTING IN JANUARY 1986.

III RECORD REQUIREMENTS

EACH AGENCY MUST ESTABLISH AND MAINTAIN IN A COMPUTERIZED FILE A RECORD, BY FISCAL YEAR, OF COMPETITIVE AND NON-COMPETITIVE PROCUREMENT ACTIONS (OTHER THAN SMALL PURCHASES). THE INFORMATION WILL BE ENTERED IN THE FPDS.

PRINCIPAL REQUIREMENTS FOR CONTRACTING PROCEDURES

SEALED BIDS MUST BE USED IF:

1. TIME PERMITS SOLICITATION, SUBMISSION AND EVALUATION OF SEALED BIDS;
2. AWARD WILL BE MADE ON THE BASIS OF PRICE AND OTHER PRICE-RELATED FACTORS;
3. IT IS NOT NECESSARY TO CONDUCT DISCUSSIONS; AND
4. THERE IS A REASONABLE EXPECTATION OF RECEIVING MORE THAN ONE SEALED BID.

OTHERWISE, COMPETITIVE PROPOSALS SHALL BE REQUESTED

1. THE HEAD OF AN AGENCY MAY USE COMPETITIVE PROCEDURES, BUT EXCLUDE A PARTICULAR SOURCE IN ORDER TO ESTABLISH OR MAINTAIN AN ALTERNATIVE SOURCE OR SOURCES OF SUPPLY IF HE DETERMINES THAT IT WOULD:
 - . INCREASE OR MAINTAIN COMPETITION AND LIKELY RESULT IN REDUCED OVERALL COSTS;
 - . BE IN THE INTEREST OF NATIONAL DEFENSE TO HAVE THE FACILITY AVAILABLE IN CASE OF NATIONAL EMERGENCY OR INDUSTRIAL MOBILIZATION; OR
 - . BE IN THE INTEREST OF NATIONAL DEFENSE IN ESTABLISHING OR MAINTAINING AN ESSENTIAL ENGINEERING, RESEARCH, OR DEVELOPMENT CAPABILITY TO BE PROVIDED BY AN EDUCATIONAL OR OTHER NON-PROFIT INSTITUTION OR AN FFRDC.
2. THE HEAD OF AN AGENCY MAY LIMIT COMPETITION TO SMALL BUSINESS CONCERNS ONLY, SO LONG AS ALL FIRMS WITHIN THAT CATEGORY ARE ALLOWED TO COMPETE. (THE PROVISIONS OF SECTION 8(a) OF THE SMALL BUSINESS ACT ARE NOT SUPERSEDED OR AFFECTED BY THESE NEW PROCEDURES.)

PROCUREMENT PROCEDURES

I SMALL PURCHASES

SPECIAL, SIMPLIFIED PROCEDURES SHALL BE PROVIDED FOR SMALL PURCHASES (\$25,000 OR LESS) BUT COMPETITION MUST BE PROMOTED TO THE MAXIMUM EXTENT PRACTICABLE

II OTHER THAN SMALL PURCHASES

1. IN PREPARING FOR PROCUREMENT OF PROPERTY OR SERVICES, THE HEAD OF AN AGENCY IS REQUIRED TO:
 - . SPECIFY AGENCY NEEDS AND SOLICIT BIDS/PROPOSALS IN A MANNER TO ACHIEVE FULL AND OPEN COMPETITION;
 - . USE ADVANCE PROCUREMENT PLANNING AND MARKET RESEARCH; AND
 - . DEVELOP SPECIFICATIONS SO AS TO OBTAIN FULL AND OPEN COMPETITION (FUNCTIONAL SPECIFICATIONS ARE PREFERRED)
2. EVALUATION AND AWARD PROCEDURES REMAIN ESSENTIALLY THE SAME AS THEY WERE FOR FORMAL ADVERTISING AND COMPETITIVE NEGOTIATION
 - A. FOR SEALED BIDS, AWARD SHALL BE MADE WITHOUT DISCUSSIONS TO THE RESPONSIBLE BIDDER WHOSE BID CONFORMS TO THE SOLICITATION AND IS MOST ADVANTAGEOUS TO THE UNITED STATES, CONSIDERING ONLY PRICE AND OTHER PRICE-RELATED FACTORS INCLUDED IN THE SOLICITATION
 - B. FOR COMPETITIVE PROPOSALS, AWARD SHALL BE MADE, WITH OR WITHOUT DISCUSSIONS WITH RESPONSIBLE SOURCES WITHIN THE COMPETITIVE RANGE, CONSIDERING ONLY PRICE AND THE OTHER FACTORS INCLUDED IN THE SOLICITATION

SEVEN CIRCUMSTANCES WHICH "OTHER THAN" COMPETITIVE PROCEDURES MAY BE USED:

1. PROPERTY OR SERVICES ARE AVAILABLE FROM ONLY ONE SOURCE AND NO OTHER TYPE OF PROPERTY OR SERVICES WILL SATISFY THE NEEDS OF THE AGENCY (INCLUDES FOLLOW-ONS AND UNSOLICITED RESEARCH PROPOSALS);
2. THE AGENCY'S NEED IS OF SUCH UNUSUAL AND COMPELLING URGENCY THAT THE UNITED STATES WOULD BE SERIOUSLY INJURED UNLESS THE AGENCY IS PERMITTED TO LIMIT THE NUMBER OF SOURCES (MUST STILL OBTAIN MAXIMUM COMPETITION PRACTICABLE);
3. IT IS NECESSARY TO AWARD TO A PARTICULAR SOURCE/SOURCES IN ORDER TO MAINTAIN A FACILITY IN CASE OF NATIONAL EMERGENCY OR TO ACHIEVE INDUSTRIAL MOBILIZATION OR TO ESTABLISH OR MAINTAIN AN ESSENTIAL ENGINEERING, RESEARCH, OR DEVELOPMENT CAPABILITY PROVIDED BY AN EDUCATIONAL OR OTHER NON-PROFIT INSTITUTION OR
5. THE STATUTE EXPRESSLY AUTHORIZES OR REQUIRES PROCUREMENT THROUGH ANOTHER AGENCY OR FROM A SPECIFIED SOURCE OR THE AGENCY'S NEED IS FOR A BRAND-NAME COMMERCIAL ITEM FOR AUTHORIZED RESALE;
6. DISCLOSURE OF THE AGENCY'S NEEDS WOULD COMPROMISE NATIONAL SECURITY UNLESS THE NUMBER OF SOURCES IS LIMITED (MUST STILL OBTAIN MAXIMUM PRACTICABLE COMPETITION); OR
7. THE HEAD OF AN AGENCY DETERMINES IT IS NECESSARY IN THE PUBLIC INTEREST TO USE OTHER THAN COMPETITIVE PROCEDURES AND GIVES CONGRESS 30 DAYS' WRITTEN NOTICE BEFORE AWARD (NON-DELEGABLE)

DOCUMENTATION REQUIREMENTS

- I WRITTEN JUSTIFICATION FOR USE OF SEVEN EXCEPTIONS TO FULL AND OPEN COMPETITION MUST BE APPROVED AT VARYING LEVELS ON A CASE-BY-CASE BASIS.
 - 1. DESCRIBE REQUIREMENT
 - 2. CITE EXCEPTION AND REASON FOR USING
 - 3. DETERMINATION THAT ANTICIPATED COST IS FAIR AND REASONABLE
 - 4. DESCRIBE MARKET SURVEY OR EXPLAIN WHY NOT CONDUCTED
 - 5. LIST RESPONSIBLE SOURCES THAT EXPRESS IN WRITING AN INTEREST
 - 6. ACTIONS, IF ANY, AGENCY MAY TAKE TO COMPETE IN FUTURE
- II LEVELS FOR CERTIFICATION
 - OVER \$100,000 - COMPETITION ADVOCATE
 - OVER \$1,000,000 - HEAD OF PROCURING ACTIVITY
 - OVER \$10,000,000 - SENIOR PROCUREMENT EXECUTIVE

PROTEST PROCEDURES

I GSA BOARD OF CONTRACT APPEALS

1. FOR ADP PROCUREMENTS UNDER P.L. 89-306 (THE BROOKS ACT)
2. GSABCA WILL USE DELEGATION OF PROCUREMENT AUTHORITY AS ENFORCEMENT MECHANISM

II GAO BID PROTEST SYSTEM

1. THE BUDGET AND ACCOUNTING ACT IS AMENDED TO CODIFY AND STRENGTHEN CURRENT GAO BID PROTEST PROCEDURES
2. ANY ACTUAL OR PROSPECTIVE BIDDER OR OFFERER WHOSE DIRECT ECONOMIC INTEREST WOULD BE AFFECTED BY THE AWARD OR FAILURE TO AWARD A CONTRACT MAY CHALLENGE THE AGENCY'S SOLICITATION, AWARD OR PROPOSED AWARD BY FILING A PROTEST WITH THE COMPTROLLER GENERAL
3. THE COMPTROLLER GENERAL MUST NOTIFY THE AGENCY WITHIN ONE DAY OF RECEIPT OF THE PROTEST. THE AGENCY HAS 25 WORKING DAYS TO RESPOND (10 DAYS UNDER THE "EXPRESS" OPTION) AND THE COMPTROLLER GENERAL HAS 90 WORKING DAYS (45 UNDER THE "EXPRESS" OPTION) TO ISSUE HIS OPINION.

CONSTITUTIONAL ISSUES

I STAY PROVISIONS

1. PROTEST BEFORE AWARD - AWARD MAY NOT BE MADE:
 - A. UNLESS HPA FINDS AND REPORTS TO COMPTROLLER GENERAL THAT URGENT AND COMPELLING CIRCUMSTANCES WHICH SIGNIFICANTLY AFFECT THE UNITED STATES' INTEREST WILL NOT PERMIT AWAITING A DECISION
 - B. FINDING MAY BE MADE ONLY IF AWARD IS LIKELY TO BE MADE WITHIN 30 DAYS
2. PROTEST AFTER AWARD - IF FILED WITHIN TEN DAYS AFTER AWARD, PERFORMANCE MUST BE SUSPENDED
 - A. UNLESS HPA FINDS AND REPORTS TO COMPTROLLER GENERAL THAT URGENT AND COMPELLING CIRCUMSTANCES WHICH SIGNIFICANTLY AFFECT THE UNITED STATES' INTEREST WILL NOT PERMIT AWAITING A DECISION
 - B. OR UNLESS HPA DETERMINES THAT PERFORMANCE IS IN THE BEST INTEREST OF THE UNITED STATES AND REPORTS HIS DETERMINATION TO THE COMPTROLLER GENERAL. IN THIS CASE, THE COMPTROLLER GENERAL SHALL MAKE HIS DECISION WITHOUT REGARD TO ANY COSTS OR DISRUPTIONS FROM TERMINATING, RECOMPETING OR REAWARDING THE CONTRACT

II COMPTROLLER GENERAL MAY DECLARE PARTY TO PROTEST ENTITLED TO COSTS OF

1. FILING AND PURSUING THE PROTEST, INCLUDING ATTORNEY'S FEES
2. BID AND PROPOSAL PREPARATION

PRINCIPAL POINTS

1. USE OF ADVANCE PROCUREMENT PLANNING TO OBTAIN FULL AND OPEN COMPETITION
2. SIMPLIFYING AND STREAMLINING THE PROCUREMENT PROCESS
3. PROMOTING THE USE OF COMMERCIAL PRODUCTS, WHENEVER PRACTICABLE
4. REQUIRING THE USE OF FUNCTIONAL SPECIFICATIONS, WHENEVER PRACTICABLE
5. REQUIRE THE USE OF COMPETITIVE PROCEDURES IN ORDER TO OBTAIN FULL AND OPEN COMPETITION
6. ELIMINATE PREFERENCE FOR FORMAL ADVERTISING, WHICH PUTS COMPETITIVE PROPOSALS ON PAR WITH SEALED BIDS
7. ELIMINATE THE EXCEPTIONS JUSTIFYING NEGOTIATION
8. SIGNIFICANTLY LIMIT THE USE OF NON-COMPETITIVE PROCEDURES
9. NEW BID PROTEST PROCEDURES
10. SUBMISSION OF COST OR PRICING DATA - \$100,000 v \$500,000
11. CREATES IN EACH EXECUTIVE AGENCY AND EACH PROCURING ACTIVITY, A POSITION CALLED THE "ADVOCATE FOR COMPETITION"
12. PROHIBITS USING OTHER THAN COMPETITIVE PROCEDURES BASED ON LACK OF ADVANCE PLANNING OR CONCERNS FOR OBLIGATION OF FUNDS

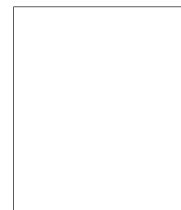
PERSONNEL & TRAINING STAFF

2nd QUARTER - FY 85

Recruitment Activity

- . Added two OL careerists to act as focal point for the recruitment/tracking of individuals being considered for employment.
- . Developed an Applicant Data Base in VM in order to facilitate the tracking of applicants prior to being put in process as well as after.
- . Began systematically calling individuals in process to assure them of OL's continued interest.
- . Statistical picture of recruitment activities during the second quarter, FY 85. (PROFESSIONAL & TECHNICAL ONLY)

Applicant files/resumes reviewed
Interviews requested
Interviews scheduled
Applicants placed in process
Applicants who entered on duty



Training Activity

- . Coordinated the showing of the video tape "You Are What You Eat" to OL and OC employees.
- . Collected data on courses given by OL for the IG study of OTE.
- . Coordinated and participated in two runnings of the OL orientation course which was attended by a total of employees.
- . Based on the January meeting of the Logistics Training Panel, assisted in the interviewing and ultimate nominations of four primary and two alternate candidates for the DDA CT program.
- . Participated in eight meetngs for the design of the OL portion of the DA/CT course.
- . Participated in the final planning stages and implementation of the OL Foreign Language and Incentive program.

Page 2

- . Monitored, on two occasions, the 3 hour exam for OL employees taking the Management of Defense Acquisition Contracts course.
- . Completed plans for the third annual Secretarial Conference which was held [] in April 1985.

General Personnel Actions

- . Completed final stages of the reorganization of the P&TS panel responsibilities.
- . Added two recruitment focal point officers and one personnel assistant to the Personnel and Training Staff.
- . Semi-annual promotion reviews of GS-13 and 14 personnel were held as well as annual promotion reviews of SIS, GS-15, GS-08 and GS-07 personnel.
- . Based on panel recommendations, approximately [] nominations of OL careerists for component assignments were prepared.

As can be seen from the foregoing, the pace of activities in P&TS during the Second Quarter continued at a high level. The emphasis on recruitment took on new importance with the advent of the 120-day processing initiative which was levied on D/OP by the DDCI. The effect of his initiative on component personnel staffs has taken the form of shorter deadlines for handling applicant files and increased requirements for statistical reporting.

SECURITY STAFF, OL

During the quarter January - March 1985, OL/SS accomplished the following in administering the Industrial Security Program.

The Industrial Security Officers conducted inspections at contractor facilities as follows:

Initial Inspections
Reinspections
Close-outs

--

OL/SS processed Industrial Security Approval ISA requests from Contractors as follows:

Confidential
Secret
Top Secret

--

OL/SS received approved ISA requests from CI/OS and notified appropriate contractors as follows:

Confidential
Secret
Top Secret

--

OL/SS received ISA terminations from Contractors.

OL/SS received Secrecy Agreements from Contractors.

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HEADQUARTERS CLAIMS REVIEW BOARD

25X1 1. The Agency focal point for submission and adjudication of personal property claims against the United States per [redacted] is OL/Information and Management Support Staff. Such claims involve personal property that is lost, damaged, or destroyed incident to an employee's Government service.

2. Second quarter status report of claims submitted to HCRB:

25X1 Claims Received - [redacted]
 25X1 *Claims Adjudicated [redacted]
 25X1 Amount Claimed [redacted]
 25X1 Amount Paid - [redacted]
 25X1 **Claims Denied - [redacted]
 ***Claims Appealed [redacted]
 Amount Disallowed/Category Limits - \$4,160.00
 Amount Disallowed/Other - \$1,037.14

*Two claims returned to Support Offices for payment as recommended by CRO since amount claimed was under \$300 and within the authority of the Operating Official. (\$122.00 and \$104.61)

**Of the 6 claims denied:

- 3 were determined not incident to service
- 1 was a perceived personal financial loss of \$2,650.00 due to selling of 2 POVs as claimant was sent home short of tour at the convenience of the Government. He felt he should have gotten more.
- 1 was denied due to negligence (\$40.00)
- 1 was filed beyond the statutory 2 year timeframe (\$250.00)

***Of the 2 claims appealed to the DDA:

- 1 for \$250.00 filed beyond the 2 year timeframe, the HCRB's decision was upheld by the DDA, but it was paid under HR 30-2, "Special Authorities of the DDA"
- 1 for \$400.00 determined not incident to service is still pending

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25X1 3. As part of the HCRB's continuing effort to familiarize
Agency personnel with the Claims Act [] regarding
25X1 submission procedures, maximum amount allowed, and category
limits for certain types of property, the CRO presented five
lectures during this quarter to attendees of the OTE/Overseas
Orientation Course (C of C); OC/Overseas Orientation Program
[] Field Admin [] and a new OTE course at C of C
entitled Orientation to Foreign Travel given specifically for
DDSGT personnel who travel TDY frequently or who have been
25X1 assigned PCS.

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? MAY 1985

MEMORANDUM FOR: Chief, Real Estate and Construction Division, OL
Chief, Procurement Division, OL
Chief, Printing and Photography Division, OL

FROM:
Chief, Information and Management Support Staff, OL

SUBJECT: FY 85 Second Quarterly Planning Conference

REFERENCE: Multi adse memo dtd 10 Apr 85, Same Subject
(OL 4062-85)

The Dry Run of the Second Quarterly Planning Conference has
been rescheduled from 1430 hours, 13 May to 1600 hours 13 May.

Questions concerning this change should be directed to

Distribution:
1 ea addressee
1 - OL/IMSS Official
1 - OL/IMSS Chrono

OL 4078-85

Orig: mjs 7 May 85

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ROUTING AND RECORD SHEET				
SUBJECT: (Optional) Office of Logistics Second Quarterly Review				
FROM:	Asst. DA Planning Officer		EXTENSION	NO.
			DATE	23 May 1985
TO: (Officer designation, room number, and building)	DATE		OFFICER'S INITIALS	COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)
	RECEIVED	FORWARDED		
1. OL/IMSS				<p>Edie,</p> <p>Attached is a draft of the recent Quarterly Review. I have made a couple of pen and ink changes. Please add any comments, make additional changes, or deletions and return to me.</p> <p>Thanks,</p> <p>Steve</p> <p>Steve: Thanks. Hope these minor changes are legible. STAT</p> <p>Edie - 5/29/85</p> <p>3-5 Edie, Attached is final version for your records Tnt Steve</p>
2. [redacted]	5/24/85	5/29	ef	
3. Asst. DA Planning Officer 7D18 HQS	4/3	6/3	SPD	
4.				
5. OL/IMSS				
6. [redacted]				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				

31 May 1985

MEMORANDUM FOR THE RECORD:

Subject: Office of Logistic's FY1985 Second Quarterly Review

1. The Office of Logistics (OL) held its FY1985 Second Quarterly Review on 20 May 1985 at 0930 hours. [redacted] Mr. Henry P. Mahoney (D/OL) began by presenting a very brief summary of the morning agenda and indicated that the presentations would focus on specific OL activities and projects that were active during the last quarter.

2. A summary of OL accomplishments during the reporting period was presented by [redacted]. He stated that the printing workload in the Printing and Photography Division (P&PD) increased 11% and the photography section showed a 12 1/2% increase in volume over 2nd quarter FY1984 totals. Additionally, the Procurement Division had a 17% increase in total workload over the same period last year. Both OL Divisions are involved in many activities, proposals, and projects and have experienced a "booming business" since the start of the fiscal year. Mr. Mahoney further emphasized the increased workload throughout OL by mentioning that a total of 12 new OL slots have been established in the DS&T to assist in providing increased logistical support to that Directorate. [redacted] also mentioned that all professional positions in the centralized procurement staff (not including procurement teams) are currently encumbered, a "first" in a number of years. Other major accomplishments took place in the following areas:

- a. Data Administration - (Increased Wang installations)
- b. Material Acquisition and Movement - (Increased Tonnage)
- c. Supply Operations - (Facilities upgrades and support)
- d. Real Estate and Construction - (Contracts and renovations)
- e. New Building Activities - (Construction and design)
- f. Operations, Maintenance and Engineering (Cafeteria, Auditorium, Parking lots plus improvements in worldwide service [redacted])
- g. Personnel (Recruitment and Training)

S E C R E T

25X1 In closing, [] said that of 24 reportable objectives for the second quarter, six were completed, one was canceled, seven are on their original schedule, and ten are on or operating against a revised schedule.

25X1 3. Next, [] briefed on OL support of []
25X1 WANG/CRAFT installations. [] explained OL's role in
25X1 providing construction management and engineering for site renovations
25X1 and new construction []

25X1 4. [] briefed on P&PD's recent Television
25X1 Production Activities survey. He stated that current television
activities within the DA are free-wheeling projects with many DA Offices
responding separately to their own legitimate requirements. []
said that the Agency is, at best, five to ten years behind industry with
regard to TV production and utilization. Additionally, the Agency has a
tendency to emphasize the post-production aspects of TV, while industry
has proven that program quality comes predominately from pre-production
efforts. He suggested and elaborated on the following items that
warrant close consideration:

- a. Define each components charter
- b. Establish the "authority" of a television producer
- c. Establish a uniform occupational series
- d. Consolidate budget management
- e. Create DA television engineering and maintenance capabilities
- f. Standardize equipment and systems

25X1 [] suggested the future consolidation of television management
of all DA components and facilities, possibly at the Directorate level,
and the creation of a monitoring and full-function program manager to
oversee these activities. He summarized by stating that DA TV
production is in need of further improvement and analysis to determine
whether or not full centralization of television activities by the DDA
will benefit CIA. (The DA currently handles 70% of the Agency's
television production.) In closing, [] said that copies of the
complete 1985 DA Television Production Activities Survey would be
available for Mr. Fitzwater and his staff at the completion of the
review session.

25X1

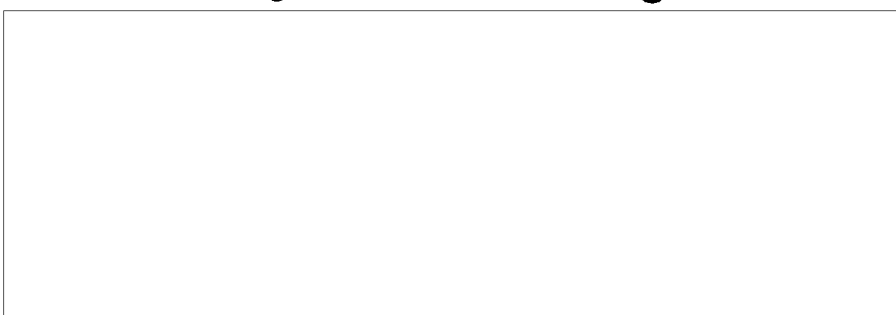
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25X1



6. The final speaker of the morning was [redacted] who addressed the changes in procurement practices resulting from the "Competition in Contracting Act" of 1984. The act calls for full and open competition relative to awarding contracts and has provisions which allows a contractor to challenge the awarding of a contract (which can result in halting a project pending review or litigation). This could have a significant impact on the Agency's ability to conduct its business as usual. [redacted] said that OL will be closely observing protest legislation, as private industry and Government openly test the statute and provisions of the Competition in Contracting Act.

7. Mr. Mahoney then summarized the presentations, solicited questions, and stated that a briefing on the LIMS project would be given in the near future. He asked Mr. Fitzwater if there were any special topics he wished to be kept informed on. Mr. Fitzwater replied by mentioning a number of key logistical projects impacting on the Agency, [redacted] a decision on a new computer site, possible expanding of the P&PD building, and the LIMS project. After a short discussion on the status of personnel, duties, and clearances relative to Allied Maintenance employees, Mr. Mahoney adjourned the session at 1035 hours.



DDA/MS: [redacted] 31May85
Orig - File
1 - D/OL
1 - DDA Chrono
1 - DDA/MS Chrono